Creating and Managing Contracts in Ohio|Buys

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Audience: Users responsible for creating and managing contracts within Ohio|Buys.
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**Overview:** The State of Ohio’s Department of Administrative Services (DAS) is responsible for the management of statewide Supplier contracts. Agencies can create and manage contracts that apply only to their agency. The process of creating, negotiating, signing, and maintaining contracts happens within Ohio|Buys and is complete once a contract is signed by the State and the Supplier.

**Processes Covered:**

1) **Contract Creation:** When a recommendation for award is made after a solicitation or when the need arises, a contract record should be created. This contract record contains important details related to the contract such as the Supplier’s information, the start date of the contract, and the expiration date.

2) **Contract Review:** During negotiations, the contract can be authored directly within Ohio|Buys or edited offline then uploaded into the system. Contract teams allow users to manage security for each contract individually. Teams also pull in necessary subject matter experts to review and approve. The contract workflow routes each contract to the approvers that have been selected.

3) **Contract Maintenance:** Different activities related to maintaining the contract record throughout its lifecycle can be conducted directly within Ohio|Buys. Users can terminate, suspend, and amend a contract if the need arises.
Navigating This Document

Ways to Use the Contracts Module:

- **Introductory Users**: Users who are leveraging contracts at this level will create a contract record in Ohio|Buys and leverage contract attachments to house important documents.

- **Core Users**: Users who are leveraging contracts at this level will create the contract record and author a contract directly in Ohio|Buys using Native or MS Word Authoring. A price list, dealers, and/or subcontractors may also be added. The contract will be signed using OneSpan Sign.

- **Full Users**: Users who are leveraging contracts at this level will create the contract record and author a contract directly in Ohio|Buys using Native or MS Word Authoring. Additional details such as price list, dealers, and/or subcontractors may also be added. After the contract is signed, the lifecycle is maintained. Activities such as Change Requests and Supplier Performance can be tracked on the contract record.

Please note, certain sections of this learner guide only apply to specific usage levels. To determine which sections of this learner guide you will need to review, please refer to the table on the following page.
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<td>Add Dealers</td>
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<td>Author a Contract</td>
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<td>Sign a Contract Using OneSpan Sign</td>
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</table>
CREATING A CONTRACT RECORD

Topics

• Create a Contract Without An Ohio|Buys Solicitation
• Create a Contract from a Solicitation
CREATE A CONTRACT WITHOUT AN OHIO|BUYS SOLICITATION

Overview

- **What’s Covered**: This section walks through the process of creating a contract record within Ohio|Buys that is not linked to a solicitation.


- **Used When**: A contract record needs to be created.
Step-by-Step Instructions for Creating a Contract Without An Ohio|Buys Solicitation

▲ Contracts can be created from a solicitation or as a stand-alone record. Users cannot retroactively link a solicitation to a contract. For instructions on how to create a contract from a solicitation or “flip a solicitation”, click here or refer to the section of this learner guide.

Log in to Ohio|Buys. From the Main Menu Navigation Bar, click Contracts and then select Create from the drop-down menu.

In the General Information box, populate the mandatory Contract Type (e.g., Competitive Selection, Requisite Program) and the Contract Sub-Types fields (e.g., Enterprise Contract, Master Services Agreement) based on the executed contract.

▲ Please consult the table of Contract Types and Contract Sub-Types at the end of this section for an overview of the varying types and who can create each type of contract.
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

a) In the Contract Header box, populate the mandatory fields:

- **State Contract Number**: This is the contract number that will be in OAKS
- **Name**: This will be the contract name
- **Contracting Entity**: The contracting entity should reflect the agency or group responsible for initiating the contract. For example, contracts issued by the DAS office of Procurement Services should contain “DAS-Administrative Services” as the Contracting Entity.
- **Market Type**: This field indicates the type of Suppliers that are on the contract (e.g. MBE, EDGE, CRP)
- **Contract Owner**: OIT contracts will affect the direction of the purchase requisition workflow for IT commodities.
- **Bill Type**: Designates who should be billed to pay for costs associated with administering the contract (e.g., the agencies using the contract, the supplier holding the contract, both, neither, etc.).
- **Catalog Enabled**: Indicates what type of catalog is setup for this contract (e.g. hosted or punchout).

b) Populate the **Supplier** field with the Contractor’s name associated with the contract record. The hyperlink icon links to the Supplier’s record in Ohio|Buys.

c) Populate the remaining non-mandatory fields as necessary

▲ For a complete list of contract fields, refer to the **Contract Field Guide** at the end of this document.
Create a Contract Without An Ohio|Buys Solicitation

Step-by-Step Instructions for Creating a Contract Without An Ohio|Buys Solicitation

In the Contract Scope box, choose the mandatory Participating Organizations and Commodities field:

a) Participating Organizations field: Select the organizations the contract is for, which determines the agencies and/or divisions that can order from the contract.
   1) To most effectively choose the Organization, click the Selector (  ) icon and then select See All. A pop up will appear with the organizational hierarchy.
   2) Under Organizational Hierarchy, click the Expand (  ) icon next to OHIO. If you are creating an agency contract, click the Expand (  ) icon next to State Agencies.
   3) Click the Hand (  ) icon to select all values beneath the listed organization or click the Checkbox (  ) icon next to each organization to select an individual or a few organizations.
   4) Click the X (  ) icon once you have selected your organizations to move on.

b) Commodities field: Indicate the commodities tied to the contract based on the scope of the contract.
   1) To select the Commodities, type the code or description into the Commodities field and select the applicable commodity from the results displayed beneath the field.
      ▲ If you are having trouble finding the correct commodity in Ohio|Buys, you can also visit the UNSPSC website (https://www.unspsc.org/search-code) to search for a commodity.
      ▲ You can also follow the same steps used to complete the Organizations field to complete the Commodities field. However, when browsing the commodities list, either click the Hand (  ) icon to select all values beneath the listed commodity or click the Checkbox (  ) icon next to each commodity to select an individual or a few commodities.
   2. If you are selecting more than one commodity, repeat step 1.
Create a Contract Without An Ohio|Buys Solicitation

Step-by-Step Instructions for Creating a Contract Without An Ohio|Buys Solicitation

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In the **Contract Dates** section, populate the mandatory fields:

a) **Effective Date** indicates the contract start date

b) **Original End Date** field with the original or initial contract end date.

▲ For more information on how to use these fields, refer to the Contract Field Guide at the end of this document.

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a) The **Expiration Notification** section contains information about when an expiration notification will notify the contract team to review the contract for potential renewal, which usually requires an amendment. Users can enter a digit into the **Notification Period** field to represent the number of months before the **Current End Date** (and if the **Current End Date** isn’t populated, then before the Original End Date), that an e-mail notification will be sent. The **Notification Date** field is automatically populated with the exact day that is 6 months before the **Current End Date** or **Original End Date**.

b) The **Termination** section is not mandatory and is only used if and when the contract needs to be terminated prior to the **Original End Date** or **Current End Date**.

▲ For more information on how to use these fields, refer to the Contract Field Guide at the end of this document.
Step-by-Step Instructions for Creating a Contract Without An Ohio|Buys Solicitation

Click **Save**.

Once you click **Save**, the following tabs on the left side of the page become visible: Overview, Contract tree view, Contacts, Documents, Price List, Orders, Workflow, Evaluation, Dealers, Subcontractors, Supplier Change Request, Exceptions, Usage Report, Payment, and Confidential Documents.

You have now completed the steps for setting up a stand-alone contract in Ohio|Buys. To complete the contract details, refer to “Completing the Contract Details” for instructions on completing the contract details.
CREATE A CONTRACT FROM A SOLICITATION

Overview

- **What’s Covered**: This section walks through the process of creating a contract record within Ohio|Buys from an existing solicitation.
- **Used When**: A solicitation award has been made and a contract linked to the solicitation needs to be created.

<table>
<thead>
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<th>Creating a Contract Record</th>
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<tbody>
<tr>
<td>Create a Contract from a Solicitation</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>
Contracts can be created from a solicitation or as a stand-alone record. For instructions on how to create a stand-alone contract, click here or refer to the previous section of this learner guide.

Log in to Ohio|Buys. From the Main Menu Navigation Bar, click Sourcing and then select Sourcing Projects from the drop-down menu.

Search for the solicitation number in the Keywords fields. Click the Pencil (✏️) icon next to the solicitation.

Navigate to the Review Award Results tab on the left-hand side.
Creating a Contract from a Solicitation

Step-by-Step Instructions for Creating a Contract from a Solicitation

4. Click the **Create/Update a contract** button. This button is located on the Review Award Results tab in the Take Actions section of the Contract column.

5. The default option is to create a new contract. If you are updating an existing agreement, select the radio button for **Existing Contract** and then select the contract that requires updating.
In the General Information box, populate the mandatory fields:

a) **Name**: The name of the agreement

b) **Contract Type**: Indicates the type of agreement
   - Please consult the table of Contract Types and Contract Sub-Types at the end of this section for an overview of the varying types and who can create each type of contract.

c) **Contracting Entity**: The contracting entity should reflect the agency or group responsible for initiating the contract
   - For example, contracts issued by the DAS Office of Procurement Services should contain “DAS-Administrative Services” as the Contracting Entity.

The organizations and commodities will default from the solicitation into the **Scope of Application** section. Refer to the next page for details on adding additional organizations and commodity codes.
In the Contract Scope box, choose the mandatory **Participating Organizations** and **Commodities** field:

a) **Participating Organizations field:** Select the organization the contract is for, which determines the agencies and/or divisions that can order from the contract.

1) To most effectively choose the Organization, click the **Selector** ( ▼ ) icon and then select **See All**. A pop up will appear with the organizational hierarchy.

2) Under Organizational Hierarchy, click the **Expand** ( ▶️ ) icon next to OHIO. If you are creating an agency contract, click the **Expand** ( ▶️ ) icon next to State Agencies.

3) Select the **Checkbox** ( □ ) icon next to OHIO for a state-wide contract. For agency contracts, select the **Checkbox** ( □ ) icon next to the agency name.

4) Click the **X** ( ✗ ) icon once you have selected your organizations to move on.

b) **Commodities field:** Indicate the commodities tied to the contract based on the scope of the contract.

1) To select the Commodities, type the code or description into the **Commodities** field and select the applicable commodity from the results displayed beneath the field.

   ▲ If you are having trouble finding the correct commodity in Ohio Buys, you can also visit the UNSPSC website (https://www.unspsc.org/search-code) to search for a commodity.

   ▲ You can also follow the same steps used to complete the Organizations field to complete the Commodities field. However, when browsing the commodities list, either click the **Hand** ( 🧠 ) icon to select all values beneath the listed commodity or click the **Checkbox** ( □ ) icon next to each commodity to select an individual or a few commodities.

2. If you are selecting more than one commodity code, repeat step 1.
### Step-by-Step Instructions for Creating a Contract from a Solicitation

8. The contract’s team members will default with the team members from the solicitation. To remove team members, uncheck the box next to the user’s name.

   ![Team members to add](image)

   To change or add a role to a user, select a value in the **Profiles on arrival at Contracts** column.

9. If needed, you can de-select the items that should be in this contract. An example of when this would need to happen would be if different commodity groups or items should only be accessible to certain organizations and, therefore, be separated into multiple contracts for one solicitation.

   ![Proposal items to add](image)

10. Click **Save and Close**.

11. Click the hyperlink to open the newly created contract.
Click the **Header** tab.

a) In the General Information section, select the **Contract Sub-Type**.

▲ Please consult the table of **Contract Types and Contract Sub-Types** at the end of this section for an overview of the varying types and who can create each type of contract.

b) In the Contract Header section, populate the remaining mandatory fields:

- **State Contract Number**: This is the contract number that will be in OAKS
- **Market Type**: This field indicates the type of Suppliers that are on the contract (e.g. MBE, EDGE, CRP)
- **Contract Owner**: OIT contracts will affect the direction of the purchase requisition workflow for IT commodities.
- **Bill Type**: Designates who should be billed to pay for costs associated with administering the contract (e.g., the agencies using the contract, the supplier holding the contract, both, neither, etc.).
- **Catalog Enabled**: Indicates what type of catalog is setup for this contract (e.g. hosted or punchout).

b) Populate the remaining non-mandatory fields as necessary

▲ For a complete list of contract fields, refer to the **Contract Field Guide** at the end of this document.
Step-by-Step Instructions for Creating a Contract from a Solicitation

In the **Contract Dates** section, populate the mandatory fields:

a) **Effective Date** (i.e., the contract start date)

b) **Original End Date** field with the original or initial contract end date.

▲ For more information on how to use these fields, refer to the [Contract Field Guide](#) at the end of this document.

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a) The **Expiration Notification** section contains information related to how Ohio|Buys should send out automatic communications related to renegotiating or terminating a contract. These fields also trigger status changes for the contract to let users know a contract is about to expire. Complete the fields that are applicable to your contract.

b) The **Termination** section is not mandatory and is only used if and when the contract needs to be terminated

▲ For more information on how to use these fields, refer to the [Contract Field Guide](#) at the end of this document.

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Click **Save**.
## Contract Types and Sub-Contract Types

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<th>Contract Type</th>
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<th>Who Can Create This Contract Type?</th>
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<td><strong>Competitive Selection</strong></td>
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<td>• DAS Office of Procurement Services</td>
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<tr>
<td></td>
<td>b) Multi-Agency Contract</td>
<td>• DAS Office of State Printing and Mail Services</td>
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<td></td>
<td>c) Single Agency Contract</td>
<td>• Department of Transportation</td>
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<td></td>
<td>d) Printing</td>
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<tr>
<td></td>
<td><strong>Competitive Selection-Two Phase</strong></td>
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</tr>
<tr>
<td></td>
<td>a) Enterprise Contract Pre-Quals</td>
<td>• DAS Office of Procurement Services</td>
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<tr>
<td></td>
<td>b) Multi-Agency Contract Pre-Quals</td>
<td>• Department of Transportation</td>
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<td></td>
<td>c) Single Agency Contract Pre-Quals</td>
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<td></td>
<td>d) Enterprise Contract Quote</td>
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<td></td>
<td>e) Multi-Agency Contract Quote</td>
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<td>f) Single Agency Contract Quote</td>
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<td></td>
<td>g) DOT Multiple Award</td>
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<tr>
<td><strong>Waiver of Competitive Selection</strong></td>
<td>a) Master Cloud Services Agreement</td>
<td>• DAS Office of Procurement Services (for all contract sub-types except for Commercial Lease Agreements)</td>
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<td></td>
<td>b) Master License Agreement</td>
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<td>c) Master Maintenance Agreement</td>
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<td></td>
<td>d) Master Services Agreement</td>
<td></td>
</tr>
<tr>
<td></td>
<td>e) State Term Schedule-S&amp;LG, GSA, DOD, or VA</td>
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<tr>
<td><strong>Agency Administered</strong></td>
<td>a) Personal Service Agreement</td>
<td>• All State Agencies (excluding DAS Office of Procurement Services)</td>
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<tr>
<td></td>
<td>b) General Services Agreement</td>
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<td>c) General Goods Agreement</td>
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<td></td>
<td>d) Professional Service Agreement</td>
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<tr>
<td><strong>Requisite Program</strong></td>
<td>a) DRC-Ohio Penal Industries (OPI)</td>
<td>• Applicable Requisite Program (i.e. OPI, CRP, OOD-Business Enterprise Program, OIT, DAS-State Printing and Mail Services, DMH-Ohio Pharmacy Services, OFCC)</td>
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<td>b) DAS-Community Rehabilitation Program (CRP)</td>
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<td>c) OOD-Business Enterprise Program</td>
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<td>d) DAS-Office of Information Technology (OIT)</td>
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<td></td>
<td>e) DAS-State Printing and Mail Services</td>
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<td></td>
<td>f) DMH-Ohio Pharmacy Services</td>
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<td></td>
<td>g) Ohio Facilities Construction Commission (OFCC)</td>
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<td></td>
<td>h) OFCC Local Agency Administered Agreement</td>
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<tr>
<td><strong>Comparison</strong></td>
<td>Comparison</td>
<td>• The purpose of this is to allow DAS to input items offered on punchout catalogs so price audits can be conducted to ensure pricing offered on punchout catalogs is consistent with contracted price.</td>
</tr>
</tbody>
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<tr>
<td>Real Estate</td>
<td>a) Commercial Lease Agreement</td>
<td>• Real Estate Analysts</td>
</tr>
<tr>
<td>Direct Purchase</td>
<td>Direct Purchase</td>
<td>• Catalog Analysts</td>
</tr>
</tbody>
</table>

You have now completed the steps for setting up a contract record in Ohio|Buys from an existing solicitation. To complete the contract details, refer to “Completing the Contract Details” for instructions on completing the contract details.
COMPLETING THE CONTRACT DETAILS

Topics

• Add Contract Contacts
• Add Payment & Negotiated Terms
• Upload Documents
• Confirm a Price List
• Add Dealers
• Add Subcontractors
• Author a Contract (Native)
• Author a Contract (MS Word)
ADD CONTRACT CONTACTS

Overview

• **What’s Covered**: This section walks through the process of completing additional tabs on the contract record related to team members, terms/conditions, or payment.


• **Used When**: A new contract record is created in Ohio|Buys.
Add Contract Contacts

Step-by-Step Instructions for Adding Contract Contacts

Navigate to the **Contacts** tab to add Supplier and internal contacts:

a) To add a Supplier contact:
   1) Click **Select Existing Contact**
      ▲ If a Supplier contact does not exist in Ohio|Buys, please reach out to the Supplier and ask them to update their contacts.
   2) Scroll to the relevant Supplier contact and click the **Checkbox ( )** icon next to their name. The Supplier contact has been added to the contract record.
      ▲ You can also input a keyword in the Keywords field or select a Supplier from the Supplier field and then click Search to find a specific Supplier contact.

b) The “Internal team” lists all state employees, who can be added as team members to view and approve the details of this contract. To add internal contacts:
   1) Type the internal contact’s name in the **Select Team** field.
   2) Select their name from the drop-down menu.
c) If you want to change an internal contact’s local profile on the contract:

1) Click the X (❌) icon in their current profile to first remove the assigned profile.
2) Click the Selector (🔍) icon and select the applicable profile from the drop-down menu:

- **Reviewer:** This role allows a user to view and edit a contract
- **Legal (Contract):** This role pulls in a user during the Legal Approver step of the contract approval workflow. This role cannot edit the contract.
- **Other Approver (Contract):** This role pulls in a user during the Other Approvers step of the contract approval workflow. This role cannot edit the contract.
- **Responsible (Contract):** This role can only be assigned to one person. This person is responsible for managing the contract and will receive automatic notifications from Ohio|Buys regarding renewals amendments, and change requests
- **Contributor/SME (Contract):** This role allows a user to have the ability to find the contract in Browse Contracts and provides view-only access

You have now completed the steps for adding contacts to a contract record in Ohio|Buys. To complete the remaining contract details, refer to “Add Payment & Negotiated Terms” for instructions on adding terms and conditions to a contract.
ADD PAYMENT & NEGOTIATED TERMS

Overview

- **What’s Covered**: This section walks through the process of adding payment information and negotiated terms to a contract record.
- **Used When**: A contract record is created in Ohio|Buys.
Navigate to the Negotiated Terms tab.

The fields on the Negotiated Terms tab are not mandatory, but many of them have downstream impacts to the Purchasing process.
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

Step by Step Instructions for Adding Payment & Negotiated Terms

For a full guide to leveraging contract fields, refer to the [Contract Field Guide](#) at the end of this document.

Below are key fields that have downstream impacts to the Purchasing process.

a) **Revenue Share %**: This field needs to be completed if the contract is part of a revenue share.

b) **Fund Code**: This field will pre-populate if the contract is part of revenue share. It denotes which fund Revenue Share payments are deposited to.

c) **Contract Not to Exceed**: This field is important if there is a spend ceiling for the contract. Purchases against the contract that exceed the ceiling will be blocked.

d) **Payment Terms**: The value in this field transfer into OAKS. Will default to “due immediately” if no other value is selected.

e) **Chart of Account Values (section)**: If pre-determined chartfield information for a purchase requisition needs to be established, these values can be documented here. If COA values are established, they will still be editable on the purchase requisition.

You have now completed the steps for adding negotiated terms and payment to a contract in Ohio|Buys. To complete the remaining contract details, refer to "[Upload Documents](#)" for instructions on uploading documents as attachments to the contract record.
Overview

- **What’s Covered**: This section walks through the process of uploading documents to a contract record in Ohio|Buys.
- **Used When**: A contract record is created in Ohio|Buys and has a contract document or supplemental documents that should be attached.
If you plan to author the contract outside of Ohio|Buys, refer to the Contract Authoring (MS Word) section of this learner guide.

The Documents tab can be used to house supporting documents for a contract. To upload a document, navigate to the Documents tab.

1. Under the Supplemental Documents section, click Create Document.

2. Select your document type.
   - **Confidential Document:** Only visible to the contract team in the confidential documents tab. An example would be specific information related to a subcontractor like pricing.
   - **Internal Document:** Visible to all users who can see that contract.
   - **Public Document:** Documents that are to be posted publicly. An example would be a redacted version of the entire contract document (since an authored document is not posted to the public portal). These are visible to any users who can see the contract internally and all public visitors.
   - **Supplier Confidential Document:** These documents are only visible to the contract team in the confidential documents tab and Suppliers on the contract. An example of this would be floor plans of building that should only be visible to the internal and supplier contacts on the contract, not all State users with access to the contract.
Complete the mandatory fields.

a) **Title**: Insert the title of the document
b) **Version**: The version number of the contract

Complete the non-mandatory fields as necessary.

a) **Summary**: A thorough description of the document can be added here
b) **Attachments**: The document can be uploaded here

a) To save as a draft and finish later, click **Save as draft**.
b) To save as a draft and close the window, click **Save & Close**.
c) To publish the final version, click **Publish**.
d) If you have saved a draft, but wish to cancel the document click **Delete**.

You have now completed the steps for uploading documents to a contract in Ohio|Buys. To complete the remaining contract details, refer to "Confirm a Price List" for instructions on reviewing the price list on a contract record.
CONFIRM A PRICE LIST

Overview

- **What’s Covered**: This section walks through the process of reviewing the initial price list that is used during negotiations. This is a precursor to creating a catalog if one will be created.
- **Used When**: A contract record is created in Ohio|Buys.
Confirming a price list is an opportunity for a user to review the details of items that have been transferred from a solicitation or are being added as part of the contract setup process. The price list should reflect the items housed within the contract document and functions as a “cheat sheet” for anyone viewing the contract record. It is also the precursor for the catalog. The price list is where catalog items associated with the contract are listed. For more information managing catalogs refer to the Managing Hosted Catalogs Learner Guide.

During Negotiations, the catalog import process should be initiated and occur simultaneously with the contract approval process. If not, items may be added to the catalog with missing information. For more information on the process for importing a hosted catalog or initiating a punchout catalog, refer to the Managing Hosted Catalogs Learner Guide.

From within the contract, navigate to the Price List tab. Review the item information listed in the item grid. If updates need to be made to the information, select the Pencil (📝) icon next to the item.

Review and update the Product Information as needed.

The Bidder/Supplier will carry into the item information as the Manufacturer. To avoid errors during purchasing, the Supplier must be identified as a Manufacturer. To add the Supplier as a Manufacturer, submit a request to the Catalog Management team by emailing ohiosharedservices@ohio.gov.

For more information on how to use these fields, refer to the Managing Hosted Catalogs Learner Guide.
To update the item information, scroll down to the bottom of the page to the **Other Items** section and select the **Pencil** (✏️) icon next to the item.

Review and update the Item information as needed.

▲ For more information on how to use these fields, refer to the **Contract Field Guide** at the end of this document.

▲ If added to the Team, the Approvers and the Supplier will be able to review this information.

You have now completed the steps for confirming a price list on a contract in Ohio|Buys. To complete the contract details, refer to "**Adding Dealers**" for instructions on adding dealers to a contract.
ADD DEALERS

Overview

- **What’s Covered**: This section walks through the process of adding Dealers to a contract record.
- **Used When**: A contract record is created in Ohio|Buys and dealers will need to be listed on the contract.
Step-by-Step Instructions for Adding Dealers

1. From within the contract, navigate to the Dealer tab.

   a) Click Add Dealers.
      ▲ Dealers are entities that are authorized to resell a product, supply or service from a product or supply manufacturer, and/or service provider.
      ▲ For example, Lenovo would be the parent Supplier or contractor on a contract, but a dealer would be a Supplier that fulfills the purchase order for the State.

   b) Input the name of the dealer in the mandatory Dealer field. Select the applicable dealer from the relevant results.

   c) Populate the Dealer ID field as necessary.
      ▲ The Dealer ID will be appended to the end of the contract number (e.g. “-1”) to create the dealer’s contract record in OAKS and referenced on the purchase order line (when applicable). This field is not automatically populated.

   e) If you want to add another dealer, click Save & Close, Click Add Dealers, and repeat steps b, c, and d.

   f) Once you finish adding dealers, click Save & Close to return back to the contract record.

2. 

You have now completed the steps for adding dealers to a contract in Ohio|Buys. To complete the contract details, refer to “Add Subcontractors” for instructions on adding subcontractors to a contract.
ADD SUBCONTRACTORS

Overview

- **What’s Covered**: This section walks through the process of creating a contract record within Ohio|Buys.
- **Used When**: A contract record is created in Ohio|Buys and subcontractors will need to be listed on the contract.
Step-by-Step Instructions for Adding Subcontractors

1. From within the contract, navigate to the **Subcontractor** tab.

   a) Click **Add Subcontractors**.
      ▲ Subcontractors are companies that have been contracted to perform a portion of the work within the contract. These entities will be selected by the primary Supplier on the contract.

   b) Input the name of the subcontractor in the mandatory **Subcontractor Name** field.

   c) Select the applicable subcontractor from the relevant results.

   e) If needed, complete the following non-mandatory fields.
      - Effective Date
      - Expiration Date
      - Embedded Dollar Amount (applies to competitive contracts only)
      - Embedded Percentage (applies to competitive contracts only)
      - Estimated Dollar Amount (Non-Embedded)
      - Estimated Percentage (Non-Embedded)

   f) If you want to add another subcontractor, click **Save & Close**, click **Add Subcontractors**, and repeat steps b, c, and d.

   g) Once you finish adding subcontractors, click **Save & Close**.

2. You have now completed the steps for adding subcontractors to a contract in Ohio|Buys. To begin the review and approval process, refer to "Reviewing & Executing Contracts" for instructions on negotiating with a Supplier, approving a contract, and electronic signatures using OneSpan Sign.
**CONTRACT AUTHORING (NATIVE)**

Overview

- **What's Covered**: This section walks through the process of authoring a contract directly in Ohio|Buys using Native Authoring.
- **Used When**: A contract is created in Ohio|Buys and the document needs to be drafted

<table>
<thead>
<tr>
<th>Completing the Contract Details</th>
<th>Introductory</th>
<th>Core</th>
<th>Full</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author a Contract</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Step-by-Step Instructions for Authoring a Contract

1. From within the contract, navigate to the Documents tab.

2. Under Main Documents, click Create Document and select Main Contract.

3. Select Native Authoring and click OK.

4. Complete the mandatory fields and click Save.
Contract Templates and Master Clauses can be used to start drafting a contract.

a) To insert a contract template, select a template from the Select Template field.

b) To insert a contract clause, select the Add Master Clause. Use the Keywords field to search for the clause name and select the insert (      ) icon next to it. When finished inserting clauses, click the X icon on the pop up window.

c) To revert the contract back to the previous version, click Resynchronize with last version.

d) Mark All Comments as Read will mark each comment on each clause as read.

Text can also be typed directly into the contract and re-formatted using the Text Editor.

a) To insert a new clause, click New Clause and confirm by click OK.

b) Click in the area of the clause you wish to edit. Text can be typed or copy/pasted.

When finished authoring, click Save & Close.
While using Native Authoring, users can switch to MS Word Authoring. However, once the switch has been made Native Authoring can no longer be used to author future versions.

To switch to MS Word Authoring, click **Switch to Word Redlining**.

You have now completed the steps for authoring a contract in Ohio|Buys. To complete the steps for reviewing and approving a contract, refer to **Reviewing & Executing Contracts**.

If you are authoring a contract using MS Word Authoring, refer to **Contract Authoring (MS Word)**.
CONTRACT AUTHORING (MS WORD)

Overview

- **What’s Covered**: This section walks through the process of authoring a contract directly in Ohio|Buys using Microsoft (MS) Word Authoring.
- **Used When**: A contract is created in Ohio|Buys and the document needs to be drafted

<table>
<thead>
<tr>
<th>Table: Completing the Contract Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introductory</td>
</tr>
<tr>
<td>Author a Contract</td>
</tr>
</tbody>
</table>
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

1. From within the contract, navigate to either the Documents tab.

2. Under Main Documents, click Create Document and select Main Contract.

3. Select MS Word Authoring and click OK.

4. Complete the mandatory fields, upload the initial contract document, and click Save.
Step-by-Step Instructions for Authoring a Contract

5
To further edit the document, click **Edit Document**. The contract will open in Microsoft (MS) Word.

▲ Microsoft (MS) Word must already be installed on the user's computer in order to edit the contract.

6
When finished editing the document, click the save icon in MS Word.

The MS Word program will close. To close out of the document in Ohio|Buys, click **Save & Close**.

You have now completed the steps for adding subcontractors to a contract in Ohio|Buys. To complete the steps for reviewing and approving a contract, refer to **Reviewing & Executing Contracts**.

If you are authoring a contract using Native Authoring, refer to **Contract Authoring (Native)**.
REVIEWING & EXECUTING CONTRACTS

Topics

• Negotiate with a Supplier
• Review and Approve a Contract
• Sign a Contract Using OneSpan Sign
• Upload a Signed Contract
NEGOTIATE WITH A SUPPLIER

Overview

- **What’s Covered**: This section walks through the process of negotiating contract details with a Supplier in Ohio|Buys.
- **Used When**: A contract record is created in Ohio|Buys and needs to be negotiated with the supplier prior to signing.
Negotiate with a Supplier

Step-by-Step Instructions for Negotiating with a Supplier

▲ Negotiations with a Supplier can be bypassed. If negotiations are not bypassed, a Supplier can make edits and return the draft contract to the Contract Responsible team member and the workflow will proceed to the “Review and edit if necessary (rejects back to Supplier if edits are made)” step of the contract workflow.
▲ The responsible user will receive an email notification when you have a contract to review, and it will also be visible on the Ohio|Buys homepage as an open workflow task in your My Pending Validations box.

To open the contract, log in to Ohio|Buys. Click on the Object hyperlink next to the contract that requires your review.

<table>
<thead>
<tr>
<th>Workflow</th>
<th>Activity</th>
<th>Object</th>
<th>Due date</th>
<th>History</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Records Request V2</td>
<td>Records Request Review</td>
<td>16</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GH Contract Workflow V3</td>
<td>Review and edit if necessary (rejects back to supplier if edits are made)</td>
<td>12345 - ALB Rbye2 092120 Amendment #1 - ROBY SERVICES LTD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requisite Workflow</td>
<td>Waiver Decision</td>
<td>934</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Navigate to the Documents tab to review the changes by the Supplier. If additional redlining is needed, edit the contract as needed. After making the edits, click Send for Supplier Review.

If no further redlines are needed, click Submit.

You have now completed the steps for negotiating a contract with a Supplier in Ohio|Buys. To complete the contract details, refer to "Review and Approve a Contract" for instructions on approving a contract during the workflow.
REVIEW AND APPROVE A CONTRACT

Overview

- **What’s Covered**: This section walks through the process of reviewing and approving a contract record.
- **Used When**: A contract is routed to a Legal Approver or Other Approver during the contract workflow.
Review and Approve a Contract

Step-by-Step Instructions for Reviewing and Approving a Contract

1. Contacts with the Legal (Contract) role will be pulled in to review during the Legal Approver step in the workflow.
2. Contacts with the Other Approver (Contract) role will be pulled in to review during the Other Approver step in the workflow.
3. You will receive an email notification when you have a contract to review and it will also be visible on the Ohio|Buys homepage as an open workflow task (“Legal Approver” or “Other Approver”) in your My Pending Validations box.

Log in to Ohio|Buys. Under My Pending Validations, click the object hyperlink next to the contract that requires your review.

<table>
<thead>
<tr>
<th>Workflow</th>
<th>Activity</th>
<th>Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>OH Contract Workflow V3</td>
<td>Legal Approver</td>
<td>12345 - ALB Roby/2 062120 - ROBY SERVICES LTD</td>
</tr>
<tr>
<td>Requisite Workflow</td>
<td>Waiver Decision</td>
<td>Req00000003817 - Copy of Req: 10/25/2019 (Adj/112040 Scholarship Program BEAR - Robinson Will)</td>
</tr>
</tbody>
</table>

2. To review the authored contract, navigate to the Documents tab and click the Pencil (✍️) icon next to the document you would like to review.

3. Existing comments can be viewed or new comments can be added by selecting the Blog (💬) icon next to a clause.

Enter a comment.

Click Save & Close.
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

4. Click **Save & Close** to return back to the contract shell.

5. When your review is complete, click **Approve**.

▲ If you would like to reject the contract, click **Reject**.

▲ You will be required to enter a reason for your rejection. The contract will be returned to the Draft status and the Responsible team member.

You have now completed the steps for reviewing and approving a contract in Ohio|Buys. To begin the process of signing a contract, refer to "Sign a Contract with OneSpan Sign" for instructions on how to use OneSpan Sign to capture electronic signatures.
SEND A CONTRACT FOR SIGNATURE USING ONESPAN SIGN

Overview

- **What’s Covered**: This section walks through the process of sending a contract for electronic signature using OneSpan Sign.
- **Used When**: A contract has been created and undergone all review and approvals.

<table>
<thead>
<tr>
<th>Reviewing &amp; Executing Contracts</th>
<th>Introductory</th>
<th>Core</th>
<th>Full</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sign a Contract Using OneSpan Sign</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

1. When all Reviewers/Approvers have approved, the contract will enter the Contract Signature step in the workflow and appear in the Pending Validations for the Contract Responsible user.

   Log in to Ohio|Buys and select the name of the contract in the Pending Validations section.

   Navigate to the Documents tab and select the checkbox (square) next to the final version of the contract.

   Click Create Signature Transaction.

   You will automatically be redirected to OneSpan sign.
   ▲ If your internet browser is configured to block pop ups, then you will need to turn off your Pop Up Blocker and perform this step again.

2. a) One inside of OneSpan sign, you will need to add recipients. These individuals will be everyone that needs to sign the document within the State and on the Supplier side.
b) Complete the mandatory fields for the recipient.

Add Recipient

Recipient Details for Add Recipient

Type
Recipient
Role *
Supplier
First Name *
Arianna
Last Name *
Bradley
Email *
ariannabradley@supplier.com

After adding all of your recipients, you will need to add the signature fields. To add a signature field:

a) Select the name of the recipient that should sign.

- If the correct recipient is not selected prior to inserting the field, users may not sign in the correct

a) Drag and drop the signature field in the area of the contract where the person should sign.
Send a Contract for Signature Using OneSpan Sign

Step-by-Step Instructions for Sending a Contract for Signature Using OneSpan Sign

4 ▲ Each field will be color coded to match the color for each recipient
▲ Fields can be re-sized to fit the area allotted within the contract document

5 After inserting all of the correct fields, click the **Send to Sign** button and confirm by clicking **Send**.

▲ An email will be sent to each recipient with a link to the contract

You have now completed the steps for sending a contract for electronic signatures using OneSpan Sign in Ohio|Buys. To manage a contract during its lifecycle, refer to "Managing Contracts" for instructions on processing contract change requests, creating amendments, suspending contracts, and terminating contracts.
UPLOAD A SIGNED CONTRACT

Overview

- **What’s Covered**: This section walks through the process of signing a contract outside of Ohio|Buys then uploading the signed document.
- **Used When**: A contract has been created and undergone all review and approvals outside of Ohio|Buys.
When all required reviewers and approvers have approved a contract, the contract will enter the Contract Signature step in the workflow and appear in the **Pending Validations** for the Contract Creator.

Log in to Ohio|Buys and select the name of the contract in the **Pending Validations** section.

Under the Supplemental Documents section, click **Create Document**.

Select your document type.

▲ Typically signed contracts will be uploaded as Internal Documents to allow the contract team and other Ohio|Buys users with access to that contract to see the document. If the document needs different security authorizations or needs to be posted publicly, then other document types can be used. For more information on the different security restrictions and uses for each document type, refer to the section of this learner guide with instructions for **Uploading Documents**.
Complete the mandatory fields.

a) **Title:** Insert the title of the document
b) **Version:** The version number of the contract

c) **Summary:** A thorough description of the document can be added here
b) **Attachments:** The document can be uploaded here

a) To save as a draft and finish later, click **Save as draft.**
b) To save as a draft and close the window, click **Save & Close.**
c) To publish the final version, click **Publish.**
d) If you have saved a draft, but wish to cancel the document click **Delete.**
After uploading the signed contract, click Approve.

8

a) To save as a draft and finish later, click Save as draft.
b) To save as a draft and close the window, click Save & Close.
c) To publish the final version, click Publish.
d) If you have saved a draft, but wish to cancel the document click Delete.

You have now completed the steps for uploading a signed contract in Ohio|Buys. To manage a contract during its lifecycle, refer to "Managing Contracts" for instructions on processing contract change requests, creating amendments, suspending contracts, and terminating contracts.
MANAGING CONTRACTS

Topics

• Processing a Change Request
• Amending a Contract
• Suspending a Contract
• Terminating a Contract
Overview

- **What’s Covered:** This section walks through the process of fielding a change request for a contract from a Supplier in Ohio|Buys.
- **Used When:** A change request for a contract is submitted in Ohio|Buys by a Supplier.
Suppliers can submit a change request for various reasons. When a change request is submitted, the contract will appear in the **Pending Validations** for the Contract Responsible user.

You will receive an email notification when you have a contract change request to review and it will also be visible on the Ohio|Buys homepage as an open workflow task (“Analyst Review”) in your My Pending Validations box.

Log in to Ohio|Buys. Under **My Pending Validations**, click the object hyperlink next to the contract change request that requires your review.

Navigate to the Supplier Change Request tab to view the request details.
To approve the Supplier’s request, click **Approve Supplier Change**. An amendment will need to be created.

For more information on creating an amendment, refer the [next section of this learner guide](#).

To reject, click **Reject Supplier Change**. You will be required to enter a reason for the rejection. The contract will remain in Signed status.

You have now completed the steps for processing a change request for a contract in Ohio|Buys. To review how to amend a contract, refer to "Create an Amendment" for instructions on creating an amendment from an existing contract.
CREATE AN AMENDMENT

Overview

- **What’s Covered**: This section walks through the process of creating an amendment to an existing contract in Ohio|Buys.
- **Used When**: A change to a contract or its details needs to be made and reviewed/approved in Ohio|Buys.

<table>
<thead>
<tr>
<th>Managing Contracts</th>
<th>Introductory</th>
<th>Core</th>
<th>Full</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create An Amendment</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
**Create An Amendment**

**Step-by-Step Instructions for Creating An Amendment**

1. ▲ Amendments can be created after a need arises internally within the State or Agency, or at the request of a Supplier. The change request must be fully approved first.
   ▲ Amendments can also be future dated meaning the **Effective Date** can be set for a date that is after the date the amendment was created. The amendment won’t supersede the original contract until the effective date occurs. The original contract will no longer be active once the amendment is effective.

   To create an amendment, log in to Ohio|Buys. From the Main Menu Navigation Bar, click **Contracts** and then click **Browse Contracts** from the drop-down menu.

2. Search for your contract using the **Keywords** field and click the **Pencil (✏️)** icon next to the contract that needs to be amended.

3. Click **Other Actions** and then select **Create Amendment**. You will be asked if you are sure you want to amend the contract. Click **OK** to proceed. A new contract will be created in Draft status that will be listed as a child of the original contract.

   Make updates to the contract as needed and then click **Submit**. Amendments will go through the full approval process for contracts.

4. Refer to the “Creating a Contract Record” section of this learner guide for details on how to update and complete a contract. If you are authoring an amendment directly in Ohio|Buys, refer to the “Contract Authoring” section..

You have now completed the steps for amending a contract in Ohio|Buys. To review how to suspend a contract or “put it on hold”, refer to the "Suspend a Contract" section of this learner guide.
SUSPEND A CONTRACT

Overview

• **What's Covered**: This section walks through the process of suspending a contract or “putting it on hold” in Ohio|Buys.
• **Roles**: Procurement Managers, DOT Procurement Managers, Printing Procurement Managers, Real Estate Procurement Managers
• **Used When**: A contract in Ohio|Buys needs to be put on hold or suspended.
**Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase**

1. **Log in to Ohio|Buys.** From the Main Menu Navigation Bar, click **Contracts** and then click **Browse Contracts** from the drop-down menu.

2. **Search for your contract using the Keywords field** and click the **Pencil** (✏️) icon next to the contract that needs to be suspended.

3. **Navigate to the contract header. Engage the On Hold slider.**

4. **Click Suspend/Terminate.**

   ▲ The contract is then moved to a status of Suspended and sent to the Pending Validations for individuals with the Procurement Manager profile. Other individuals are pulled in based on the contracting entity, contract sub-type, contract type, or how the contract is administered (state-wide or agency administered). DOT Procurement Managers, Printing Procurement Managers, Real Estate Contract Analysts, and Agency Contract Managers are pulled in respectively in those cases.

   ▲ The users pulled in have the ability to reactivate the contract by clicking **Un-suspend** if there are no changes (i.e., contract amendments) needed. Alternatively, the Contract can remain in suspended status and the Contract Responsible user can create an Amendment.

You have now completed the steps for suspending a contract in Ohio|Buys. To review how to terminate a contract, refer to the "**Terminate a Contract**" section for instructions on terminate a contract prior to its original end date.
TERMINATE A CONTRACT

Overview

- **What’s Covered**: This section walks through the process of terminating an active contract in Ohio|Buys.
- **Roles**: Procurement Managers, DOT Procurement Managers, Printing Procurement Managers, Real Estate Procurement Managers
- **Used When**: A contract that is active needs to be terminated prior to its end date.
## Step-by-Step Instructions for Terminating a Contract

<table>
<thead>
<tr>
<th>Step</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>▲ Terminating a contract is a decision that is pre-determined prior to initiating the process in Ohio</td>
</tr>
<tr>
<td>2</td>
<td>Search for your contract using the <strong>Keywords</strong> field and click the <strong>Pencil (✏)</strong> icon next to the contract that needs to be terminated.</td>
</tr>
<tr>
<td>3</td>
<td>Navigate to the contract header. Enter a <strong>Termination Date</strong> and <strong>Termination Justification</strong>.</td>
</tr>
<tr>
<td>4</td>
<td>Click <strong>Suspend/Terminate</strong>. The contract will expire when the termination date is reached.</td>
</tr>
</tbody>
</table>

You have now completed the steps for terminating a contract prior to its original end date in Ohio|Buys. For more information on the contract management process and the various fields on a contract record, refer to the "Appendix".
APPENDIX
<table>
<thead>
<tr>
<th>Object</th>
<th>Definition</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current End Date</strong></td>
<td>The date that the contract ends</td>
<td>May reflect termination date or modified end date due to renegotiation. Optional</td>
</tr>
<tr>
<td><strong>Code</strong></td>
<td>A unique system identifier for the contract</td>
<td>Automatically assigned by Ohio</td>
</tr>
<tr>
<td><strong>Confidential</strong></td>
<td>Indicates if the contract is confidential</td>
<td>If checked, this contract will be hidden from all State users that are not listed as internal team members even if the user has profile &amp; organizational scope that would normally allow access to this contract</td>
</tr>
<tr>
<td><strong>Contract Sub-Type</strong></td>
<td>Sub-category for contracts</td>
<td>Example: Single Agency Contract. Full list available in the Creating a Contract section.</td>
</tr>
<tr>
<td><strong>Contract Type</strong></td>
<td>Main category for contracts</td>
<td>Example: Competitive Selection. Full list available in the Creating a Contract section.</td>
</tr>
<tr>
<td><strong>Effective Date</strong></td>
<td>The start date for the contract</td>
<td>Can be after the signature date and must be dated prior to the Original End Date and Actual End Date</td>
</tr>
<tr>
<td><strong>Original End Date</strong></td>
<td>The end date for the contract at the time the record is created</td>
<td>Must be dated after the Effective Date</td>
</tr>
<tr>
<td><strong>Signature Date</strong></td>
<td>The date the contract was signed</td>
<td>If multiple signatories have different dates, it is the latest date listed</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Indicates the status of the contract</td>
<td>Statuses include: Draft, Signed, Signature In Progress, Approval In Progress, Approved, Negotiation In Progress, Deleted, Cancelled by Amendment</td>
</tr>
<tr>
<td><strong>Termination Comments</strong></td>
<td>Additional detail on why contract was terminated early</td>
<td></td>
</tr>
<tr>
<td><strong>Termination Date</strong></td>
<td>Termination date if contract terminated early</td>
<td></td>
</tr>
</tbody>
</table>
### Contract Field Guide: Contract Header (2/3)

<table>
<thead>
<tr>
<th>Object</th>
<th>Definition</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Commodities</strong></td>
<td>The commodity codes for the items included in the contract.</td>
<td>Codes follow UNSPSC code structure</td>
</tr>
<tr>
<td><strong>Contracting Entity</strong></td>
<td>The agency or group responsible for initiating the contract.</td>
<td></td>
</tr>
<tr>
<td><strong>Contract Owner</strong></td>
<td>The organizational entity that functions as the lead/point of contact for the contract.</td>
<td>OIT contracts influence purchase requisition workflow for IT related purchases</td>
</tr>
<tr>
<td><strong>Index Number</strong></td>
<td>Internal Contract Number</td>
<td>State’s internal contract number</td>
</tr>
<tr>
<td><strong>Market Type</strong></td>
<td>This field indicates the type of Suppliers that are on the contract (e.g. MBE, EDGE, CRP)</td>
<td>Example: Minority Business Enterprise “3” Contract</td>
</tr>
<tr>
<td><strong>Minimum Contract Purchase Amount</strong></td>
<td>Indicates that a single request must contain a minimum total value related to this contract in order to become a purchase order</td>
<td>The minimum total value could be the sum of different lines within the same request. Will trigger a blocking alert for all requests containing items from this contract</td>
</tr>
<tr>
<td><strong>Name</strong></td>
<td>The name or label for the contract</td>
<td></td>
</tr>
<tr>
<td><strong>Participating Organizations</strong></td>
<td>The organizations that are allowed to access and purchase items from this contract</td>
<td>These values will limit who can see items related to this contract while shopping</td>
</tr>
<tr>
<td><strong>Pre Governance Contract</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>State Contract Number</strong></td>
<td>The contract number assigned by the State</td>
<td>This does not auto-populate and must be typed in</td>
</tr>
<tr>
<td><strong>Supplier</strong></td>
<td>This is the Contractor or organization that is entering into the agreement with the State</td>
<td>Supplier must already have a record in Ohio</td>
</tr>
</tbody>
</table>
### Contract Dates

- **Award Date**:
- **Effective Date**:
- **Original End Date**
- **Current End Date**
- **Mix. End Date**
- **Min. Renewal Interval (in months)**

### Expiration Notification

- **Notification Date**
- **Notification Period (in months)**

### Termination

- **Termination Date**
- **Termination Justification**

### Contract Field Guide: Contract Header (3/3)

<table>
<thead>
<tr>
<th>Object</th>
<th>Definition</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification Date</td>
<td>This is the date that a notification goes out to the Contractor or Supplier indicating that the contract is about to expire</td>
<td>This will be outlined within the contract terms</td>
</tr>
<tr>
<td>Notification Duration</td>
<td>Minimum number of months notice that is required prior to termination or end of contract</td>
<td></td>
</tr>
<tr>
<td>(months)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Renegotiation Date</td>
<td>Date the contract terms were renegotiated</td>
<td></td>
</tr>
<tr>
<td>Renegotiation Period</td>
<td>Time period prior to the notice period set aside to renegotiate contract terms</td>
<td></td>
</tr>
<tr>
<td>(months)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Renewal History</td>
<td>Outlines any actions taken on the contract (with dates and actors) where the agreement was renewed</td>
<td></td>
</tr>
<tr>
<td>Renewal Period (months)</td>
<td>Number of months a contract is to be extended upon renewal</td>
<td></td>
</tr>
<tr>
<td>Renewal Types</td>
<td>Indicates if a contract is eligible for renewal and, if so, whether that renewal can be automatic</td>
<td></td>
</tr>
</tbody>
</table>
### Add Supplier Contacts

This section lists Supplier Contacts that are responsible for all activities related to this contract (e.g. renegotiation, renewal, notifications).

Contacts must be entered into Ohio|Buys by the Supplier and must be assigned a role of “Contract Contact”.

### Select Team

This section lists internal contacts or State users responsible for all activities related to this contract.

Each user is assigned a role or this particular contract: Responsible (Contract), Contributor/SME (Contract), Legal (Contract), Other Approver (Contractor), or Reviewer (Contract). There must always be one user listed as Responsible. Users with the Contributor/SME and Legal local profiles have editing rights, approvers can review and approve/reject, and reviewers can only view the contract.
<table>
<thead>
<tr>
<th>Object</th>
<th>Definition</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Payment Terms</td>
<td>Outlines additional details related to the payment terms within the contract</td>
<td>Would correspond to a section within the signed contract. Example: Standard payment terms are Net60 except when the total order value is under a minimum threshold in which case the terms would be Net30</td>
</tr>
<tr>
<td>Payment Type</td>
<td>Outlines additional payment types if there are circumstances in which standard payment type would not apply</td>
<td>Would correspond to a section within the signed contract</td>
</tr>
<tr>
<td>Estimated Contract Value</td>
<td>Calculated total of contract based on contracted quantity x individual price point of items listed in Price List</td>
<td>Would correspond to a section within the signed contract</td>
</tr>
<tr>
<td>Choice Criteria</td>
<td>Any criteria outlined in the contract</td>
<td>Would correspond to a section within the signed contract</td>
</tr>
<tr>
<td>Complaint Process</td>
<td>Details how to process a complaint for the Supplier’s overall performance or a specific order from the vendor</td>
<td>Would correspond to a section within the signed contract</td>
</tr>
<tr>
<td>Currency</td>
<td>Lists the currency the contract was negotiated in</td>
<td>Would correspond to a section within the signed contract</td>
</tr>
<tr>
<td>Delivery Terms</td>
<td>Lists any terms related to the delivery of goods on purchase orders</td>
<td>Would correspond to a section within the signed contract</td>
</tr>
<tr>
<td>Invoicing Terms</td>
<td>Lists any terms related to the billing of goods or services on purchase orders</td>
<td>Would correspond to a section within the signed contract</td>
</tr>
<tr>
<td>Payment Terms (drop down)</td>
<td>Lists the terms in which payments for invoices are to be remitted</td>
<td>Would correspond to a section within the signed contract. Example: Net30, Net45, Net60</td>
</tr>
<tr>
<td>Object</td>
<td>Definition</td>
<td>Additional Info</td>
</tr>
<tr>
<td>------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Payment Type</td>
<td>Indicates the preferred method of remitting payment for this agreement</td>
<td>Would correspond to a section within the signed contract. Example: Cash, EFT, P-Card</td>
</tr>
<tr>
<td>Penalties</td>
<td>Outlines any penalties for violating the contract terms</td>
<td>Would correspond to a section within the signed contract</td>
</tr>
<tr>
<td>Price Terms</td>
<td>Outlines any stipulations to the agreed upon price(s) within the contract</td>
<td>Would correspond to a section within the signed contract</td>
</tr>
<tr>
<td>Renegotiation Threshold</td>
<td>Outlines a threshold that must be reached during the renewal process in order for all of the contract terms to be subject for review and renegotiation</td>
<td>Would correspond to a section within the signed contract</td>
</tr>
<tr>
<td>Return Process</td>
<td>Outlines the terms of returning delivered goods in order to receive a reimbursement for the purchase</td>
<td>Would correspond to a section within the signed contract</td>
</tr>
<tr>
<td>Warranty Terms</td>
<td>Any warranties for the products in the contract</td>
<td>Would correspond to a section within the signed contract</td>
</tr>
<tr>
<td>Object</td>
<td>Definition</td>
<td>Additional Info</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Main Documents</td>
<td>This list contains various versions of the main contract document</td>
<td>Example: A natively authored contract document</td>
</tr>
<tr>
<td>Electronic Signature</td>
<td>This list contains uploaded documents related to the contract. If e-Signature is enabled, this section will contain a copy of the document that was authored in Ohio</td>
<td>Buys and then signed electronically</td>
</tr>
<tr>
<td>Supplemental Documents</td>
<td>This list contains documents related to the main contract</td>
<td></td>
</tr>
<tr>
<td>Object</td>
<td>Definition</td>
<td>Additional Info</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Commodity</td>
<td>Indicates the commodity code for the item in the Price List</td>
<td>Aligns with UNSPSC naming convention</td>
</tr>
<tr>
<td>Contract Tags</td>
<td>Assigns a category or tag to the contract</td>
<td>Example: MBE Set-aside</td>
</tr>
<tr>
<td>Contract Type</td>
<td>Displays the contract type listed on the contract Header</td>
<td></td>
</tr>
<tr>
<td>Currency</td>
<td>Displays the currency for the item in the Price List</td>
<td></td>
</tr>
<tr>
<td>EOD Status</td>
<td>Displays the status of the Supplier of the item in the Price List</td>
<td></td>
</tr>
<tr>
<td>Index Number</td>
<td>Displays the number listed on the contract Header</td>
<td></td>
</tr>
<tr>
<td>Link to Catalog</td>
<td>Displays a URL that links to the punchout catalog page for the item</td>
<td>This name will be listed in bold when the item is listed in search results on the Browse Items page</td>
</tr>
<tr>
<td>Name</td>
<td>Displays the name of the item</td>
<td></td>
</tr>
<tr>
<td>Price</td>
<td>Displays the unit price for an item</td>
<td></td>
</tr>
<tr>
<td>Product Code</td>
<td>A unique code assigned to each item in the catalog. Product code should follow this format: take the contract number and sequentially add a number using the following format: [contract number]-[+1]. Ex. 800100-1, 800100-2, 800100-3.</td>
<td>If the contract number ends in a hyphen followed by a number (ex: 800100-1), use the following format [contract number]-[number]-[+1]. Ex. 800100-1-1, 800100-1-2, 800100-1-3.</td>
</tr>
<tr>
<td>Product Reference</td>
<td>Displays the manufacturer’s part number</td>
<td></td>
</tr>
<tr>
<td>State Contract Number</td>
<td>Displays the contract number assigned by the State vs. Ohio</td>
<td>Buys</td>
</tr>
<tr>
<td>Tag</td>
<td>Displays the item tag</td>
<td>May or may not align with Contract Tag</td>
</tr>
<tr>
<td>UOM</td>
<td>Displays the unit of measure that in which the item can be purchased</td>
<td>Aligns with validity date for contract unless modified</td>
</tr>
<tr>
<td>Validity End Date</td>
<td>Displays the date where State users will be able to purchase the item</td>
<td>Aligns with validity date for contract unless modified</td>
</tr>
<tr>
<td>Validity Start Date</td>
<td>Displays the last day State users will be able to purchase the item</td>
<td>Aligns with validity date for contract unless modified</td>
</tr>
<tr>
<td>Object</td>
<td>Definition</td>
<td>Additional Info</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------------------------------</td>
<td>------------------------------------------------------</td>
</tr>
<tr>
<td>Activity</td>
<td>Displays the step name within the workflow</td>
<td></td>
</tr>
<tr>
<td>Click or Drag to add files</td>
<td>Allows user to upload attachments to be viewed by other approvers</td>
<td></td>
</tr>
<tr>
<td>Comment</td>
<td>Allows user to enter comments prior to approval</td>
<td></td>
</tr>
<tr>
<td>Created on (UTC-4)</td>
<td>Displays the date the contract reached a particular step within the workflow</td>
<td></td>
</tr>
<tr>
<td>Delegate to</td>
<td>Displays the name of a State user who has had approval rights delegated to them</td>
<td></td>
</tr>
<tr>
<td>Due Date (UTC-4)</td>
<td>Displays a due date for an approver, if applicable</td>
<td></td>
</tr>
<tr>
<td>Initial performer</td>
<td>Displays the name of a State user that was automatically pulled into the workflow step to approve</td>
<td></td>
</tr>
<tr>
<td>Mail History</td>
<td>Displays all communications coming out of Ohio</td>
<td>Buys for the contract</td>
</tr>
<tr>
<td>Name</td>
<td>Displays the name of a State user that was automatically pulled into the workflow step to approve</td>
<td></td>
</tr>
<tr>
<td>Previous Approvals &amp; Refusal</td>
<td>Displays all previous approval paths taken by a document</td>
<td>Can give additional detail if a contract was rejected to show the path originally taken and rejection comments</td>
</tr>
<tr>
<td>Send to</td>
<td>Allows user to select a name to reference in conjunction with their comment in the Comments field</td>
<td>Does not send an email notification to the recipient of the comment</td>
</tr>
<tr>
<td>State</td>
<td>Displays the status of the step within the workflow</td>
<td>Orange = in progress, green = validated, red = rejected</td>
</tr>
<tr>
<td>Validated on (UTC-4)</td>
<td>Displays the date/time the step was validated</td>
<td></td>
</tr>
<tr>
<td>Workflow Diagram</td>
<td>Displays the entire workflow for the contract</td>
<td>Orange = in progress, green = validated, red = rejected</td>
</tr>
</tbody>
</table>
### Contract Hierarchy

Displays hyperlinks to any contract related to the current contract

**Additional Info:** Example: other sub-contracts beneath a master agreement

### Summary of Amendments

Displays the history of actions taken to amend the original contract

---

<table>
<thead>
<tr>
<th>Object</th>
<th>Definition</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Hierarchy</td>
<td>Displays hyperlinks to any contract related to the current contract</td>
<td>Example: other sub-contracts beneath a master agreement</td>
</tr>
<tr>
<td>Summary of Amendments</td>
<td>Displays the history of actions taken to amend the original contract</td>
<td></td>
</tr>
<tr>
<td>Object</td>
<td>Definition</td>
<td>Additional Info</td>
</tr>
<tr>
<td>---------</td>
<td>---------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Create D&amp;R</td>
<td>Lists all Determinations &amp; Recommendations, if they exist. Allows the user to create a D&amp;R from the contract.</td>
<td>All D&amp;Rs are managed on a separate page under the “Suppliers” menu</td>
</tr>
<tr>
<td>Object</td>
<td>Definition</td>
<td>Additional Info</td>
</tr>
<tr>
<td>------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Add Dealers</td>
<td>Lists any Dealers that have been set up for this agreement. Allows the user to add new Dealers.</td>
<td>Dealers will serve as the <strong>Order Supplier</strong> during the purchase request process</td>
</tr>
</tbody>
</table>
## Version Control

<table>
<thead>
<tr>
<th>Version</th>
<th>Publish Date</th>
<th>Summary of Updates</th>
<th>Pages Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>10/16/20</td>
<td>Initial draft</td>
<td>All</td>
</tr>
</tbody>
</table>
